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# Apptio and Clarity, Complementary Tools

**Your Guides:**  
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# Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



# Quick Poll

- How many use Apptio in some part of the organization?
- How many have already looked into using Apptio?
- How many are using Clarity to track non-project data (time, resources, forecasts, etc)?
- How many have PMs using Excel to track project costs?
- How many are also doing work in Agile tool?
- How many have or will shift from project to product operating model?

# Agenda

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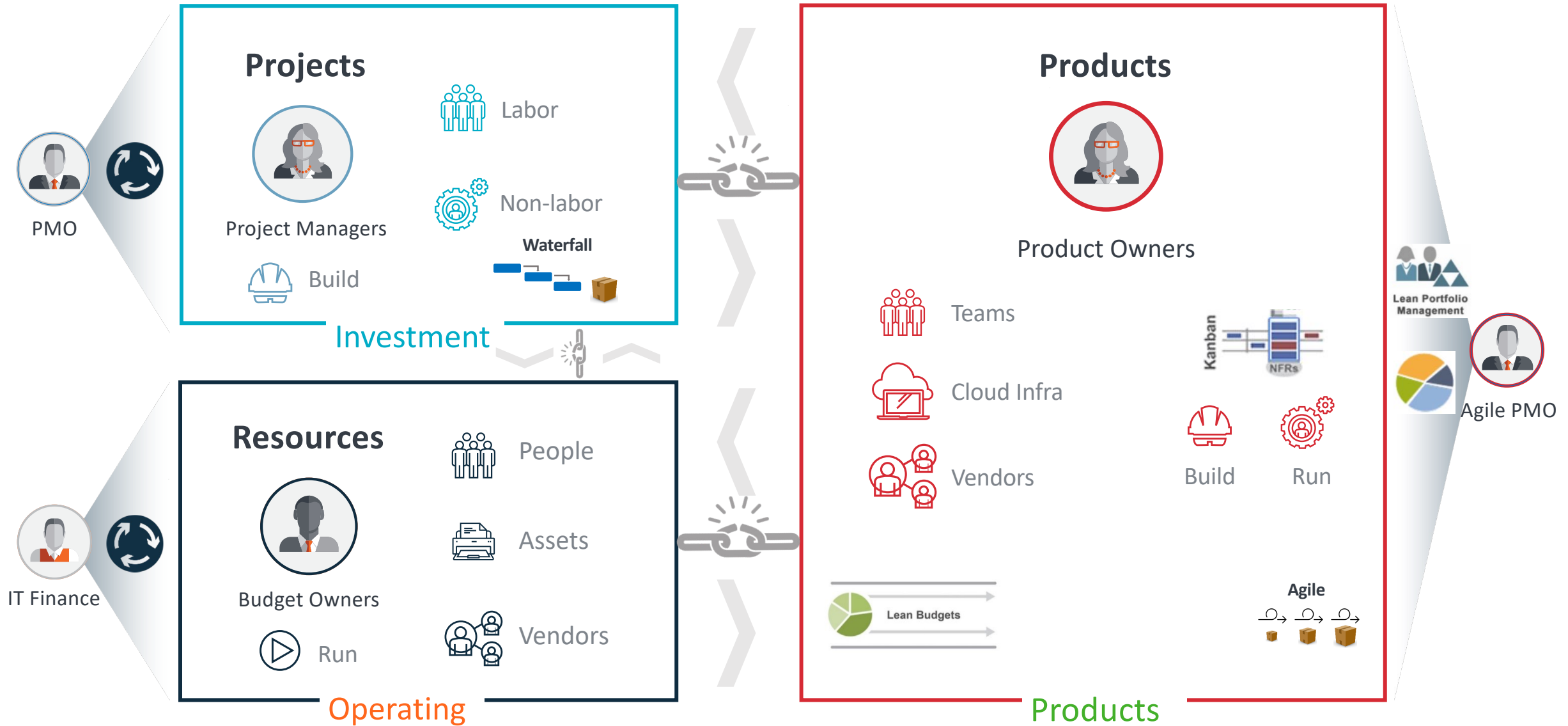
- Typical Challenges
- Apptio Introduction
- Clarity / Apptio Solution
- Apptio Demo



# Challenges



# Investment / Operating / Products Disconnect



# Typical Points of Collaboration for PMO & Finance

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## Capex/Opex

Rules for classifying labor as capital or operating.



## Integration Points

Integration points between PMO-owned and IT Finance-owned systems



## Rates

Level of detail for rates, as well as the rates themselves



## CIP

Trigger to CIP account for capital project completion (i.e. go-live)



## Systems of Record

Systems of record for financial data



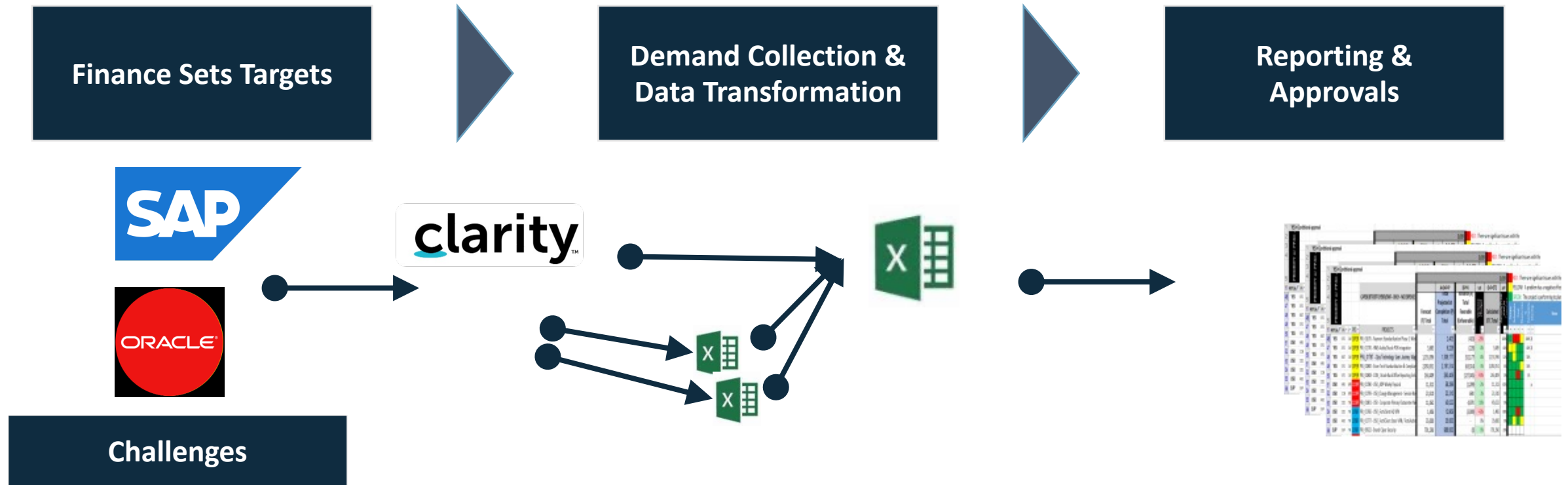
## Budget Data

Required project budget/forecast data dimensions



70% of IT executives struggle to foster collaboration between project & finance stakeholders

# Typical Planning Process



- Leadership lacks visibility and requires granularity for control
- Heavy manual efforts to transform the data
- Larger margin for error possible depending on tool selection
- Time-consuming across multiple FTE's to prepare leadership presentations
- Inability to scale



# PPM Financial Challenges

- ▶ **Complicated Processes & Reporting:** PPM systems with financial capabilities unnecessarily pull PMs into financial planning duties, and complicate processes for both PM and IT Finance teams
- ▶ **Limitations for Project Accounting:** Lack of system for true project accounting (Depreciation/amortization, vendors, cost centers, contracts, assets, GL accounts, etc)
- ▶ **Limits for Run the Business Planning:** Cannot plan out-year operational phase of projects, leaving PMO blind to realities of the full financial lifecycle of new initiatives.

# Agile Financial Challenges

- ▶ **Investment Prioritization:** How are investments evaluated and prioritized in moving from waterfall to Agile or hybrid- Waterfall/ Agile environment?
- ▶ **Resource Optimization:** Where do we optimize resources to for new innovation, maintenance, and quality efforts?
- ▶ **Value Tracking:** How to we track the \$ value of product delivered based on the investments made and resources allocated?
- ▶ **Labor Capitalization:** How do we shift from traditional capitalized labor tracking and accounting to an Agile one, considering that time is no longer based on timesheet process?

# Apptio Introduction



# Apptio. The Business System for Governing Technology



**Sales** *has* **CRM**



**HR** *has* **HRM**



**Marketing** *has* **RPM**



**Finance** *has* **ERP**

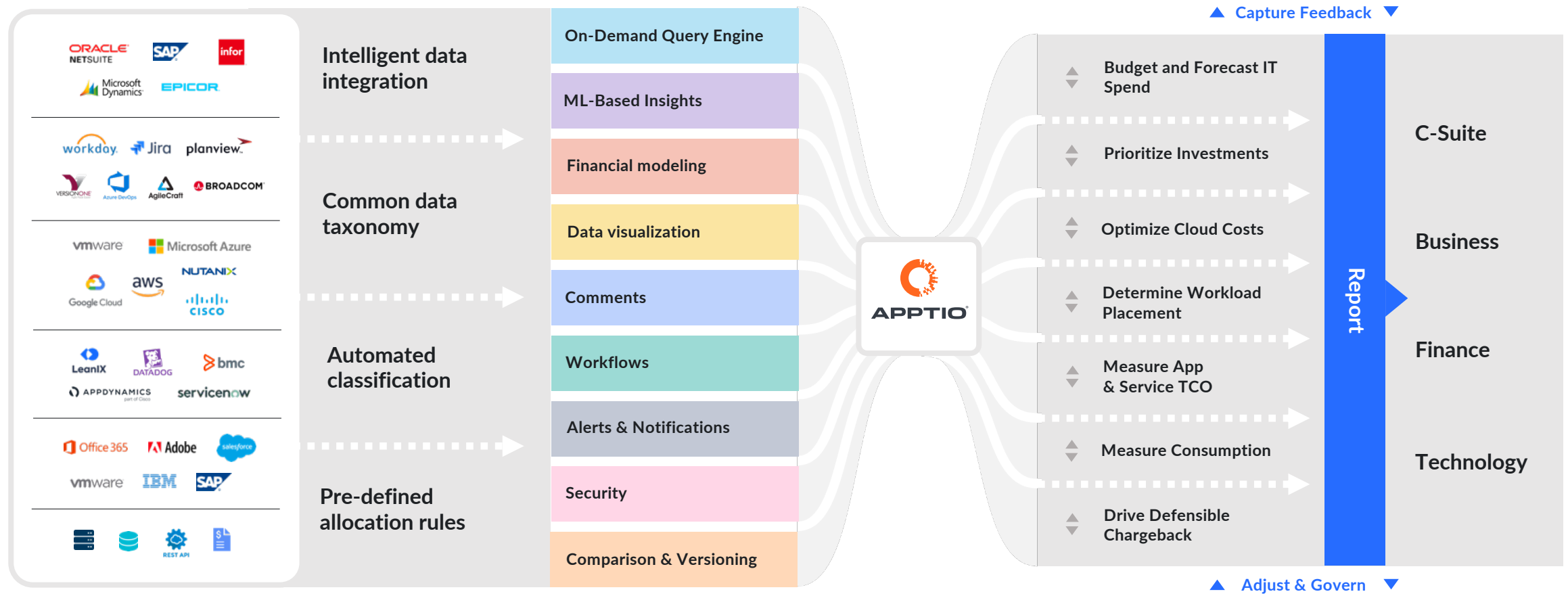


## Technology Business Management

*"TBM shifts focus from cost to value,  
accelerating the business technology agenda."*

FORRESTER®

# How Apptio Works





# Communicate & Manage IT Value with Cost Transparency

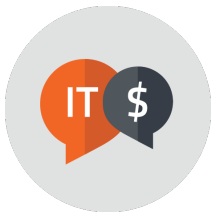


## Understand True IT Costs

Weekly and monthly standardized business views of infrastructure, projects, vendors, labor and cloud – all in one place.

### Informed Decisions

Fact-based data to make better decisions real-time



## Communicate the Value of IT

Show the cost and consumption of business applications and services to explain and defend costs in terms the business understands.

### Business Alignment

Get on the same page with business partners with a common language



## Expose Cost and Consumption Levers

Provide each BU its share of IT project, application and service costs and where they can be impacted by adjusting consumption and quality choices.

### Collaboration

BUs treat IT costs as their own and collaborate to maximize value and innovation

# Clarity / Apptio Joint Solution



# Apptio Complements Clarity

PPM



PPM Data	Apptio Data
Projects	Projects Master Data
Resources	Labor Master Data



Budgets

## Plan Work to Deliver Projects

Project intake & selection  
Labor planning for execution  
Task scheduling & management

## Plan Costs of Project Work

Project funding & budget approval  
Plan spend for all resources  
Project impact on build & run costs

# Apptio + Clarity Outcomes



## Unify

Unify portfolio and operational IT budgeting/forecasting process



## Remove Complexity

Remove finance-driven complexity from Clarity and shift those processes to Apptio



## Collaboration

Better collaboration between the PMO and IT Finance to avoid unwieldy hand-offs that slow down initiatives



## Forecast

Forecast changes in operational spend or labor usage that a project will trigger post go-live



## Contracts & Assets

Support for tracking contracts and assets related to a project



## Best of Both Worlds

Use the best functionality of each system – giving both the PMO and IT Finance the capabilities they need

# Best Practice Recommendations

## Approach

- Leverage the best capabilities of Clarity/Apptio for a joint solution
- Customer experience focus -- one place to do things
- Don't turn PMs into financial analysts

## Desired Outcomes

- Bi-directional, multi-point Apptio/Clarity integration
- Alignment of time tracking, resource mgmt, etc to TBM within PPM, with PPM feeding data to Apptio
- Streamlined cross-tool demand management / project lifecycle process
  - Demand, prioritization, project selection, approval, & handoffs between tools
- Streamlined cross-tool project-related financial processes
  - Budgeting, forecast, baseline, change control, & handoffs between tools



# Pitfalls to Avoid

Insufficient Clarity / Apptio integration

Duplicate entry of data, resulting in inefficiencies

Jumping between systems to find information, resulting in a poor customer experience

Lack of uniform project lifecycle management, including financial governance, across both PPM and Apptio

Data misalignment, with the inability to join data across systems (such as resource allocations, timesheets, and actual costs)

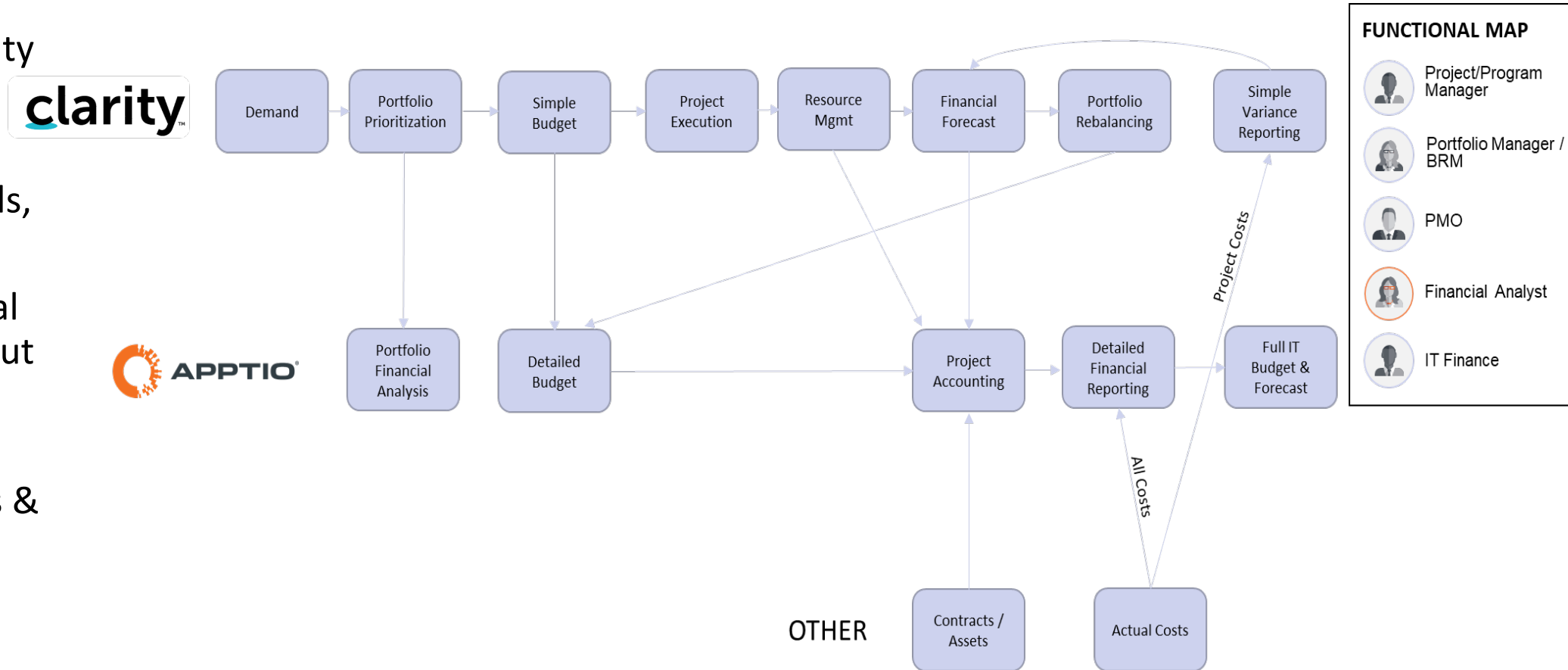
Non-uniform resource management process across systems

Project costs not being delegated to departments post-implementation

# Typical Apptio / Clarity Data Flows

## Scenario 1

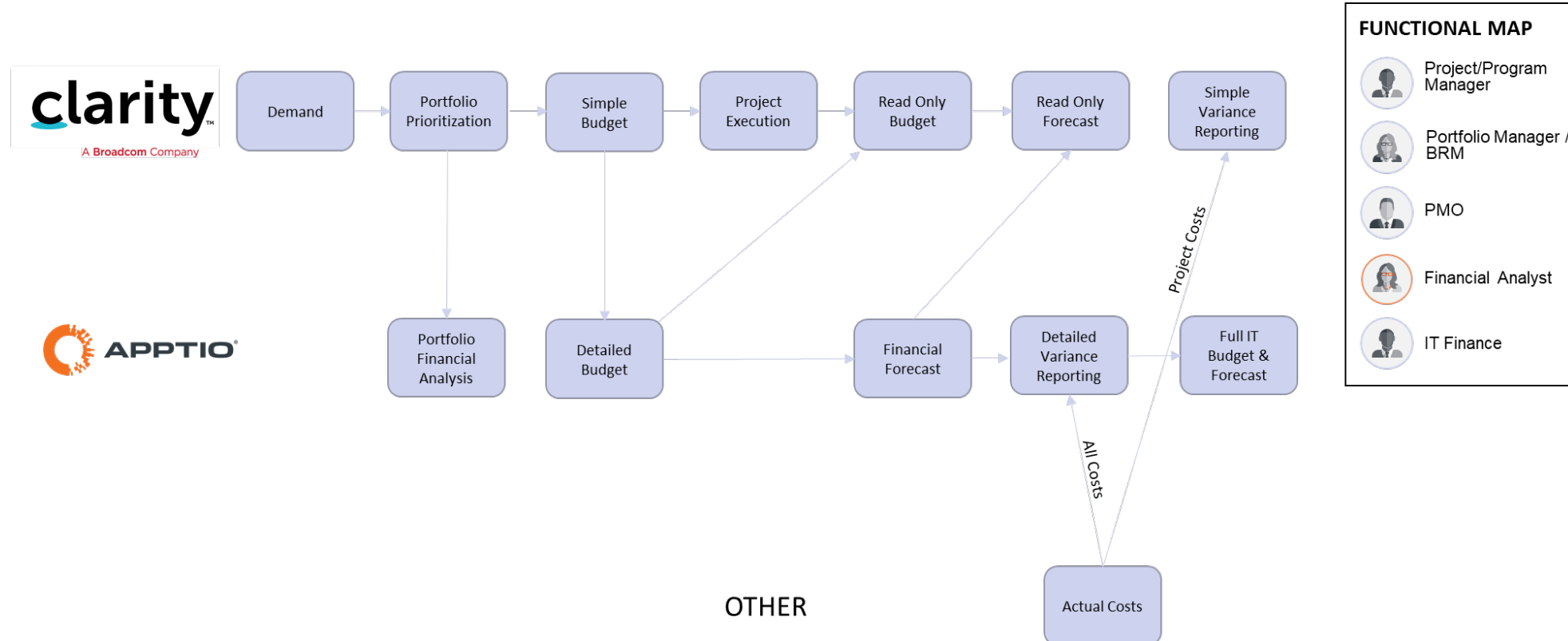
- Maximize use of Clarity functionality
- One-way integration with Apptio – Financials, Portfolio, RM
- PMs have financial responsibilities, but stay entirely in Clarity
- Financial Analysts & Senior leadership use Apptio



# Typical Apptio / Clarity Data Flows

## Scenario 2

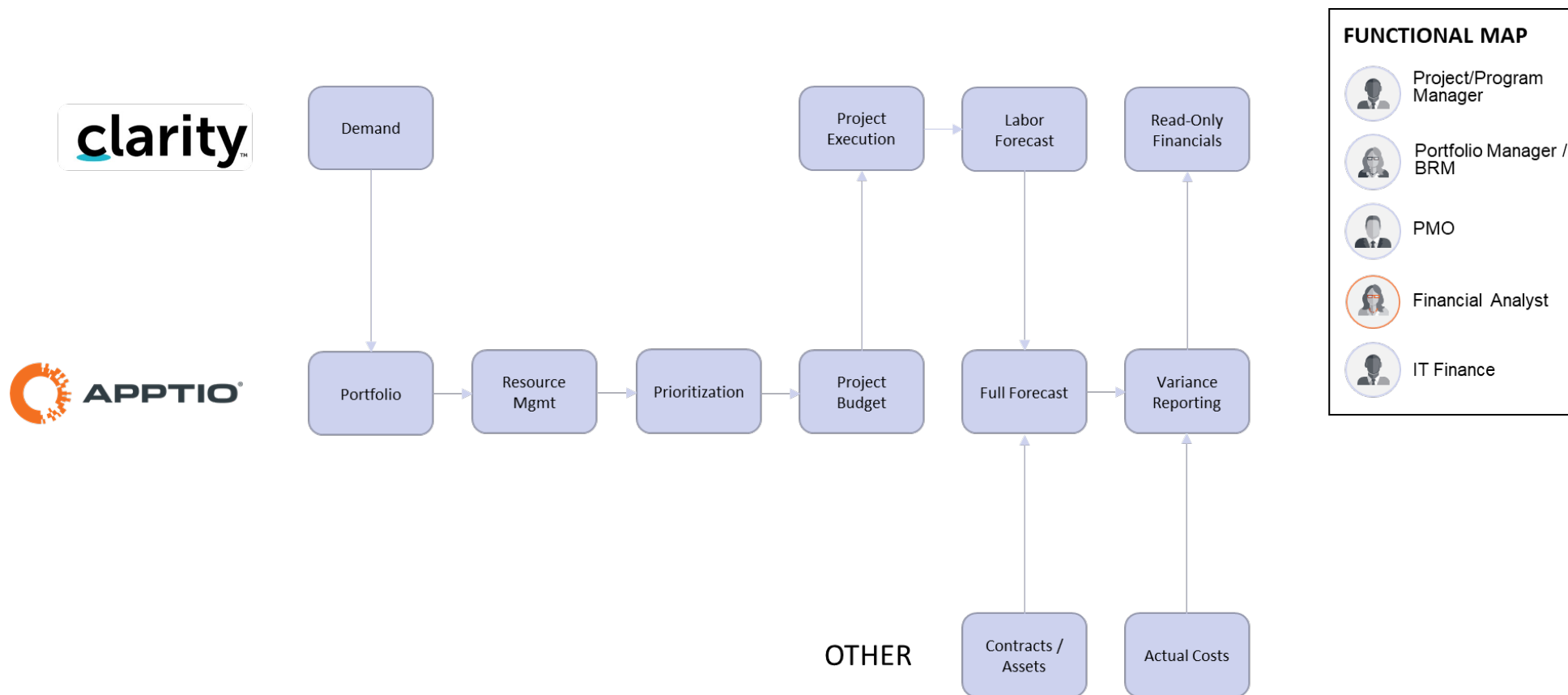
- Use Clarity for most functions, but limited financials
- Bi-directional integration with Apptio – Financials sent to Clarity read-only
- PMs have limited financial responsibilities, only responsible for internal labor cost



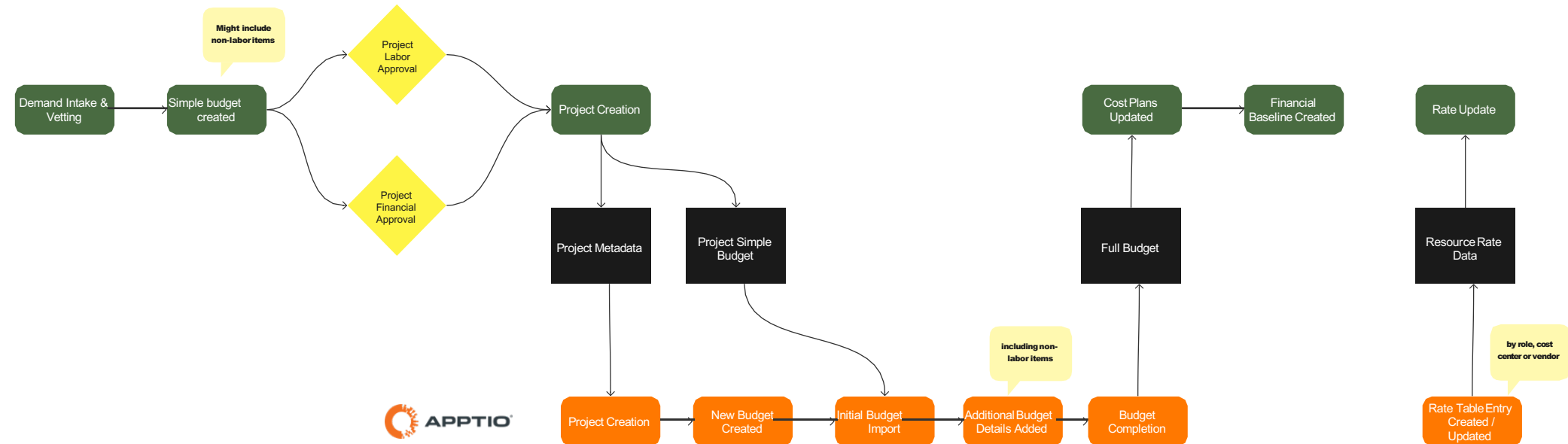
# Typical Apptio / Clarity Data Flows

## Scenario 3

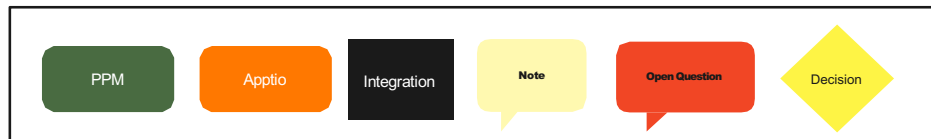
- Maximize the use of Apptio functionality – Prioritization, Portfolio Mgmt, RM
- Portfolio & Resource Managers use Apptio
- Bi-directional integration with Apptio
- PMs are split between systems – using Apptio for financials and Clarity for everything else



# Labor, Budget, and Rate Sync

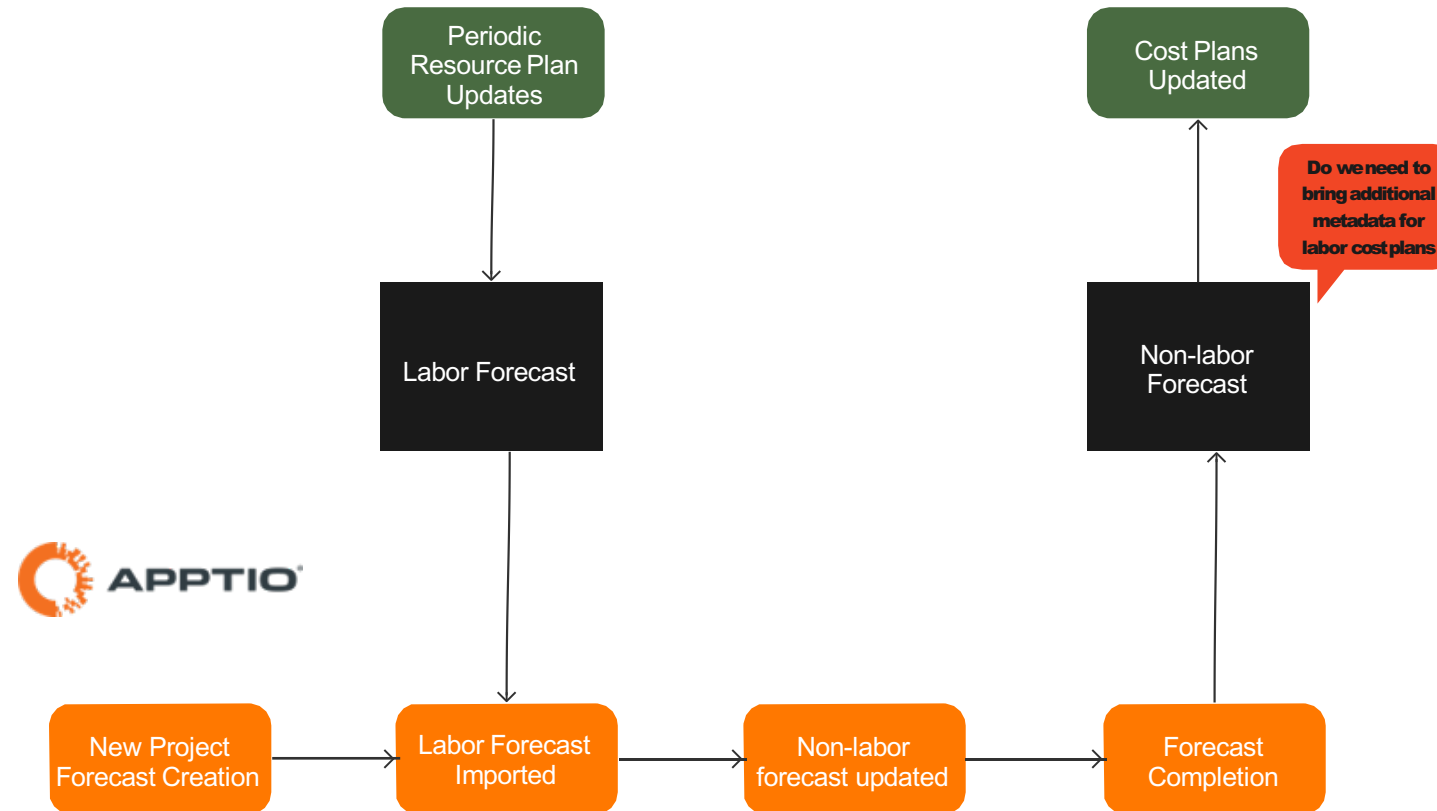


## Legend

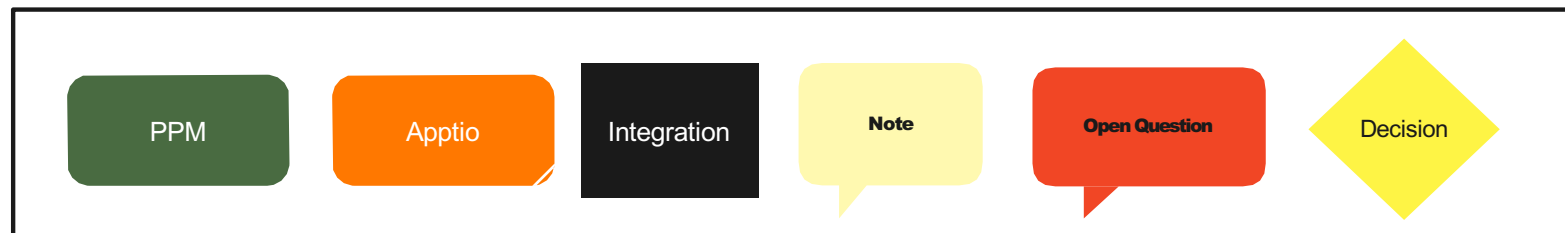




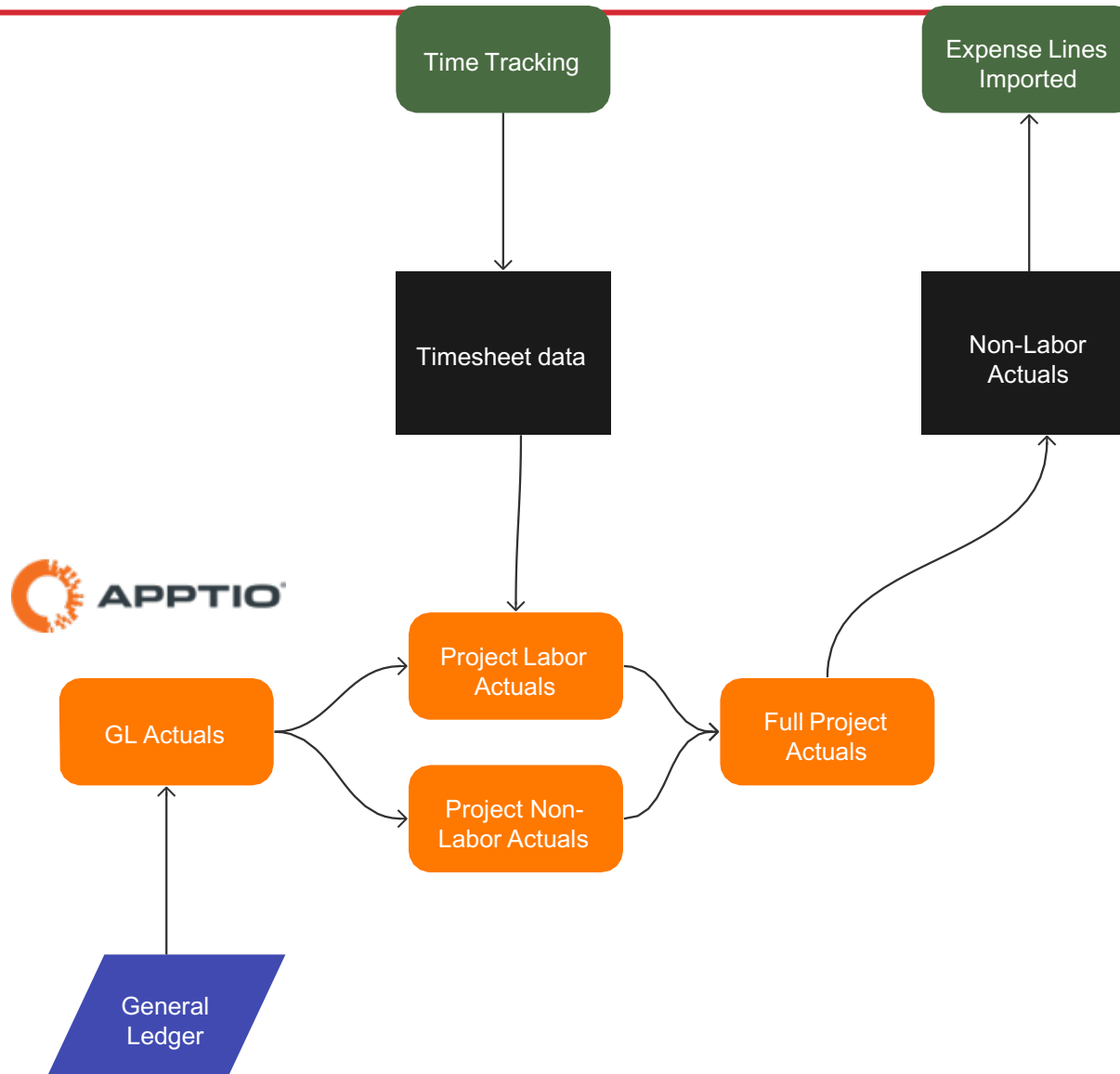
# Labor & Non-labor Forecast Sync



## Legend



# Labor & Non-labor Actuals Sync



# Apptio Demo



# Apptio Product Portfolio

## ApptioOne<sup>MX</sup>

**ApptioOne**

**ApptioOne Plus**

**ApptioOne Billing**

**ApptioOne Benchmarking**

## Cloudability<sup>MX</sup>

**Cloudability**

**Cloudability SaaS**

**Cloudability Shift**

## Planability<sup>MX</sup>

**Apptio Targetprocess**

**Planability Demand**

# Questions?





# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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